Getting Started with Open Dental - Print this document so you can keep track of your setup progress-
This is a document to help new customers figure out how to get started with setting up Open Dental. You probably had a data conversion from other software or started with a blank database: now it is time to put your practice specific settings in. This will not be done in one day but is a gradual process. There are many other features and setup tasks that are not included on either list that you can discover later. We have listed the items in order of normal setup, but the order is not always important.

Setup Item	**Check**	**Setup Hints and Web page**
Setup>Data Paths		http://www.opendental.com/manual/paths.html The data path is the shared folder where files are kept. This is usually set before pointing other computers to your server, and may already be set correctly.
Setup>Practice		http://www.opendental.com/manual/practice.html
Lists>Providers		http://www.opendental.com/manual/providers.html
Setup>Operatories		http://www.opendental.com/manual/operatories.html
Setup>Program Links		http://www.opendental.com/manual/programlinks.html Lets you launch or 'Bridge' to other software, like imaging software.
Setup>Miscellaneous		http://www.opendental.com/manual/miscsetup.html
Lists> Procedure Codes		• The standard Procedure Codes have already been entered, and just need to be activated if you are coming from the trial version, converted customers do not need to do this: http://www.opendental.com/manual/procedurecodetools.html. • For now you do not probably need to add other codes, but you will need to enter your fees. You might add codes for merchandise or other non standard codes. http://www.opendental.com/manual/procedurecodes.html • Enter your Standard or UCR fees, you might call and ask for help before entering special fees like PPO and CoPay fee schedules. http://www.opendental.com/manual/feeschedules.html and http://www.opendental.com/manual/procedurecodeedit.html
Setup>Show Features		http://www.opendental.com/manual/showFeatures.html Most users can ignore this at first; hospitals, Medicaid users, Medical Insurance users and users with more than one clinic should review these settings right away.
Setup>Clearinghouses		http://www.opendental.com/manual/clearinghouses.html You can print paper insurance claims to mail without setting this up, but setting up a clearinghouse will allow electronic claims. You may choose between many vendors see http://www.opendental.com/manual/eclaims.html. No matter how well you think you have this set up, verify that your first few claims have gotten through to the insurance companies. Use reports from the clearinghouse or their online portal to make sure your claims are being processed. Follow up with our outstanding insurance claims report.
Setup>Appointment Views		http://www.opendental.com/manual/appointmentviews.html Appointment views allow you to choose which operatories, which information shows up on each appointment, and how the information is displayed. Setting this up can often be done later, but is mentioned here because if a patient can see the screen, you may need to have an appointment view that does not show patient name for the privacy of other patients.

Other Steps for Conversion Customers Only

Setup Item	Check	Setup Hints and Web page
Aging A/R Report		http://www.opendental.com/manual/reportaging.html You need this to verify your account balance right after your conversion, before you enter additional data.
Update Query For Hygiene		Future hygiene appointments from some other software programs may come over with the hygienist set as the primary provider. Open Dental usually assigns the dentist to the appointment as the primary provider and the hygienist as the secondary provider. If you need to associate future appointments to the dentist and hygienist assigned to the operatory that the appointment is in, call Open Dental conversion team to fix by running a special script. The reason we do not run this for you during the conversion is that the Provider List and the Operatory Setup need to be completed first (see above).
Claims and Insurance Payments		http://www.opendental.com/manual/conversions.html Follow the plan you designed before your final conversion, see your “preconversion” document.
Billing		http://www.opendental.com/manual/billing.html Conversion customers should normally do a billing soon before conversion. A frequently asked question is how to do your first billing in Open Dental. Review this web page and contact us with any questions, many customers require us to walk them though their first billing (patient statements). Also see http://www.opendental.com/manual/conversions.html to review how existing insurance claims will affect your billing.
Lists>Employers		http://www.opendental.com/manual/employers.html Customers who have had a conversion should review and combine misspelled or duplicate employers.
Lists>Insurance Carriers		http://www.opendental.com/manual/carriers.html Customers who have had a conversion should review and combine misspelled or duplicate Carriers. Electronics IDs should be reviewed here too.
Lists>Insurance Plans		http://www.opendental.com/manual/insplan.html Customers who have had a conversion should review and combine insurance plans as needed. Also you might set the benefit information in the most common plans http://www.opendental.com/manual/benefitinfo.html
Setup>Recall Types		Identify the triggers that you will need for your recall, and if you make any changes to the recall types (or triggers) then click on the “Synch” button when you are finished. There is also a saved query called “Conv – Perio Patients” in case you need help identifying your perio patients. Change the recall type to perio for all of your perio patients. http://www.opendental.com/manual/recalltypes.html
Setup>Security		http://www.opendental.com/manual/permissions.html Most users who are starting with a new database set up security settings gradually after a few weeks, otherwise it is difficult to understand what the settings should be and permissions may be set too tightly. Larger conversion customers who are concerned with what permissions employees have relative to one another should review these settings soon after going live.